



Legacy Giving Bequest Language

Donors are encouraged to remember Welcome House in their estate plans. Bequests in will and trusts may be directed to Welcome House for the benefit of a named and/or restricted endowment or to support the unrestricted operational, program and facilities/capital needs.

The legal name of the organization is: Welcome House, 1414 E. 27th Street, Kansas City, MO 64108. Federal Tax ID Number is #43-0984039.

Beneficiary designations for Life Insurance Policies or Retirement Plans may also include the Welcome House. Please designate a dollar amount or percent of the policy or plan and include our EIN on the beneficiary designation form to be filed with the life insurance company.

With bequests and beneficiary designation, we are pleased to create and maintain a separate gift agreement for restricted (designated gifts and/or gift to be held in endowment to ensure Welcome House has your complete instructions and preferences.

Step 1: Describe the Gift:

"To Welcome House

- "the sum of \$ _____," or
- "____ % of my estate owned by me at my death,"
- "____% of the residue of my estate," or
- "the following described property: _____."

Step 2: Describe the Purpose:

- "for the unrestricted use and benefit of Welcome House" or
- "to support Welcome House"
- "to establish the _____ (Named) Endowment, the distribution of which is to be used "to support _____ (program or special need) at Welcome House."

Step 3: Include Language for a Restricted Gift (Optional):

Welcome House suggests that a restricted (or designated) bequest be made in the broadest terms possible consistent with a donor's interests.



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The Board of Directors of Welcome House may elect to utilize a bequest received in the future for comparable or a related purpose that becomes obsolete or unusable in the future. Please include the following language in the bequest provision:

- "...provided, however, that the Board of Directors of Welcome House is authorized to make use of the principal and income for other purposes of Welcome House should the restricted use of the bequest cease to exist. The principal and income of this gift may bear its proportionate share of expenses allocated by the Directors against invested assets of Welcome House.

The aforementioned information is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.